

How to use the Atlas Credit Card report

How to use the Atlas Credit Card report

These steps were written in 2008, but I believe they are still valid as of August 2014

1. Change from **parked** to **posted** documents.
 2. Uncheck **SA documents** (checked by default) and check **SC documents**.
 3. Enter the 6 digit unique ProCard ID, if available. When a cardholder is trained, at the end of that training session they're given an envelope with their new Procard in it and written on the envelope is their 6-digit unique id number. If client doesn't remember the number, you can try the following: In poking around, we found that if you run a DTR for the cost object to which the charges are being posted, and find the credit card charge there (it will begin with a 2), that transaction will have an alpha-numeric reference number, including the last name of the card holder and the 6 digit ID.
- For a JV search, you can limit by fund or profit center, cost center, WBS element, etc. These will not, however, impact a credit card search.
 - Dates for Credit Card charges:
 - Document date: The date the charge was made on the credit card
 - Posting date: The date the system posts the charge
 - Approval date: The date the ProCard charge was approved/verified.

Solution

If you have the 6 digit ID for the ProCard for which you are trying to search for charges, follow these steps:

1. Change the radio button from **Parked Journal Vouchers** to **Posted Journal Vouchers**
2. Set the **posting date** to a wide enough span to capture when the credit card charges may have been posted.
3. In the *Credit Card* field, enter the unique 6 digit ID that corresponds to the user's ProCard.
4. Uncheck **select SA documents**. Put a check in **SC documents**.
5. Click the **Run Report** button.

See Also

- [ProCard Landing Page](#)